Everest Group®

Everest Group PEAK Matrix® for SAP S/4HANA Service Providers 2021

Focus on Infosys

July 2021

Everest Group PEAK MATRIX®

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Background of the research

- Enterprises are adopting SAP S/4HANA to modernize their finance and accounting operations, enable end-to-end visibility across the supply chain, better forecast demand and sales, optimize inventory management, and streamline procurement operations
- However, enterprise expectations are evolving beyond the lift and shift of workloads and process reimagination to ecosystem orchestration using SAP S/4HANA to better orchestrate their enterprise application landscape to reap incremental value
- To address changing client expectations and accelerate the migration of its on-premise client base to the cloud, SAP is investing in augmenting its SAP product portfolio including SAP S/4HANA Cloud capabilities
- In this research, we present an assessment of 21 service providers featured on the SAP S/4HANA services PEAK Matrix®
- The assessment is based on Everest Group's annual RFI process for calendar year 2020, interactions with leading services providers, client reference checks, and an ongoing analysis of the SAP S/4HANA services market

This report includes the profiles of the following 21 leading service providers featured on the SAP S/4HANA services PEAK Matrix:

- **Leaders:** Accenture, Deloitte, EY, IBM, Infosys, NTT DATA, and TCS
- **Major Contenders:** Atos, Capgemini, Cognizant, DXC Technology, HCL Technologies, LTI, PwC, Tech Mahindra, T-Systems, and Wipro
- **Aspirants:** Birlasoft, Mphasis, Stefanini, and UST

Scope of this report:

Geography
Global

Service providers
21

Services
SAP S/4HANA services

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Introduction and scope

Everest Group recently released its report titled "SAP S/4HANA Services PEAK Matrix® Assessment 2021". This report analyzes the changing dynamics of the SAP S/4HANA services landscape and assesses service providers across several key dimensions.

As a part of this report, Everest Group updated its classification of 21 service providers on the Everest Group PEAK Matrix® for SAP S/4HANA services into Leaders, Major Contenders, and Aspirants. The PEAK Matrix is a framework that provides an objective, data-driven, and comparative assessment of SAP S/4HANA service providers based on their absolute market success and delivery capability.

Based on the analysis, **Infosys emerged as a Leader.** This document focuses on **Infosys'** SAP S/4HANA services experience and capabilities and includes:

- Infosys' position on the SAP S/4HANA services PEAK Matrix
- Detailed SAP S/4HANA services profile of Infosys

Buyers can use the PEAK Matrix to identify and evaluate different service providers. It helps them understand the service providers' relative strengths and gaps. However, it is also important to note that while the PEAK Matrix is a useful starting point, the results from the assessment may not be directly prescriptive for each buyer. Buyers will have to consider their unique situation and requirements, and match them against service provider capability for an ideal fit.

Source: Everest Group (2021)

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SAP S/4HANA services PEAK Matrix® characteristics

Leaders:

Accenture, Deloitte, EY, IBM, Infosys, NTT DATA, and TCS

- Leaders are characterized by their ability to successfully execute large-scale, multi-continent, end-to-end SAP S/4HANA services, underpinned by their strong global delivery network and meaningful onshore presence
- These providers have invested significantly to grow and engage talent to combat high attrition in the SAP S/4HANA services market. Leaders are also able to successfully leverage domain experts to provide good change management experiences to clients
- Furthermore, they have a mature suite of SAP-certified, SAP S/4HANA, OTS verticalized solutions to accelerate time-to-market for their clients
- Leaders have a highly balanced portfolio, and continue to keep pace with market dynamics through continued investments in SAP S/4HANA Cloud and vertical-specific solutions and services capability development (internal IP/tools, partnerships, etc.)

Major Contenders:

Atos, Capgemini, Cognizant, DXC Technology, HCL Technologies, LTI, PwC, Tech Mahindra, T-Systems, and Wipro

- These players have built meaningful capabilities to deliver SAP S/4HANA services – implementation and management/run; however, their service portfolios are not as balanced and comprehensive as those of Leaders (in terms of coverage across SAP S/4HANA service segments, service type, geographies, or verticals)
- These providers have good partnership with SAP and all the leading cloud vendors & specialist technology partners to curate client-specific SAP S/4HANA solutions
- Also, Major Contenders are making continued investments in building proprietary tools and solutions, as well as scaling their talent for SAP S/4HANA

Aspirants:

Birlasoft, Mphasis, Stefanini, and UST

- Aspirants have good proof points in delivering low to medium complex implementation and maintenance SAP S/4HANA services for Small and Mid-sized Buyers (SMBs)
- They are either focused on a region(s) or vertical(s), or currently have a relatively small SAP S/4HANA practice
- While these providers have meaningful capabilities in driving SAP S/4HANA on-premise initiatives, they might not be suitable for clients looking for SAP S/4HANA Cloud services as they lack strong partnerships with leading cloud vendors

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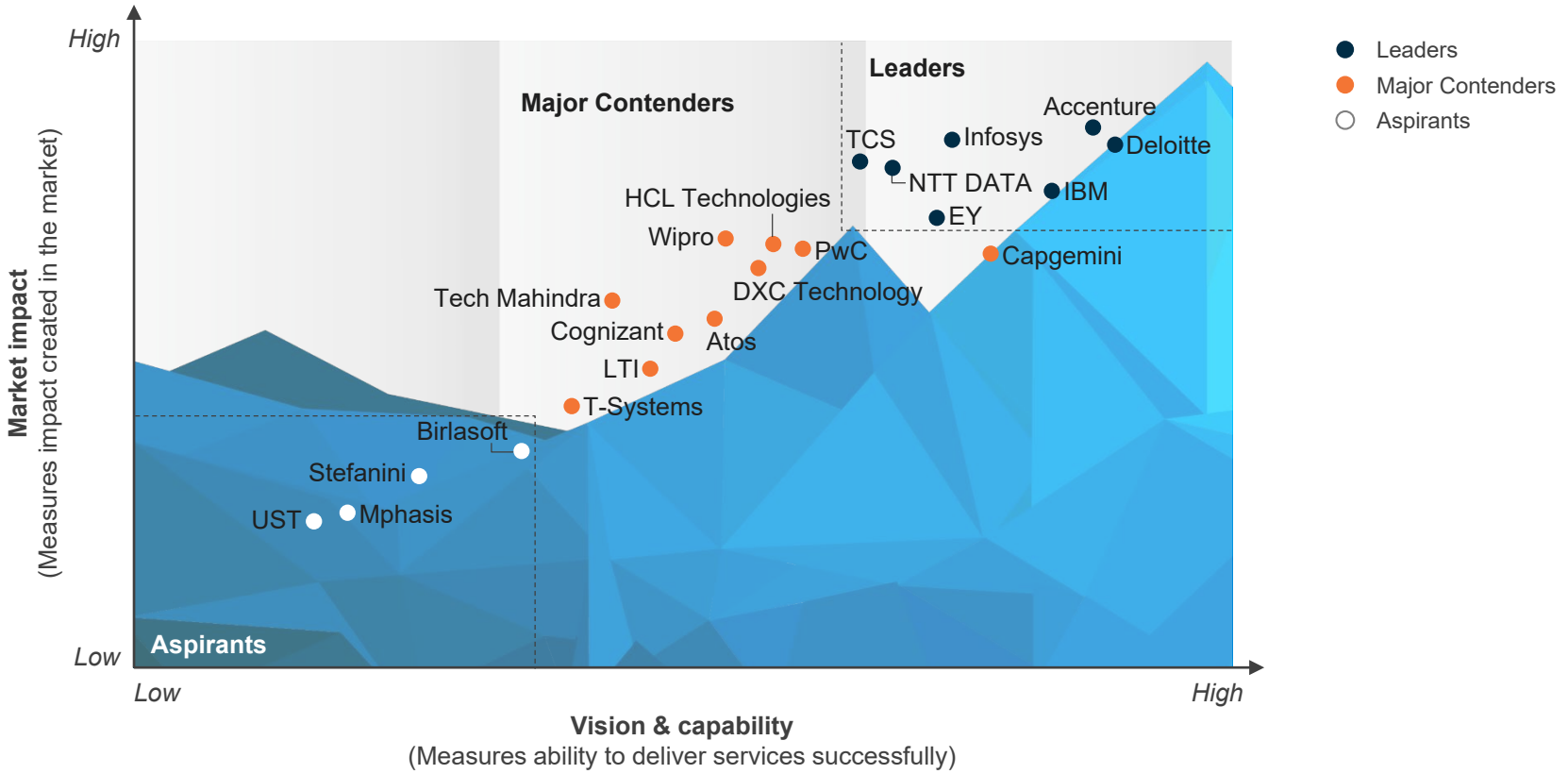
Everest Group PEAK Matrix®

SAP S/4HANA Services PEAK Matrix® Assessment 2021 | Infosys positioned as a Leader

Everest Group SAP S/4HANA Services PEAK Matrix® Assessment 2021[1]



1 Assessments for Deloitte, EY, IBM, PwC, and T-Systems exclude service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interactions with buyers

Source: Everest Group (2021)

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Infosys | SAP S/4HANA services profile (page 1 of 5)

Everest Group assessment – Leader

Measure of capability: Low High

Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall

Strengths

- Infosys is a fitting choice for large enterprises seeking cost-effective, offshore-centric, and global implementation and maintenance services for SAP S/4HANA on-premise
- Clients can benefit from its acquisitions of boutique creative consultancies – Carter Digital, Blue Acorn iCi, and WongDoody – in delivering creative design services on SAP S/4HANA
- It has demonstrable proof points in driving greenfield and brownfield SAP S/4HANA on-premise engagements across all the core SAP industries such as retail & CPG, manufacturing, and healthcare & life sciences
- Its robust suite of industry-specific catalyst solutions and a strong partner ecosystem, underpinned by its alliance with hyperscalers, and niche technology vendors, help it deliver complex client-specific solutions
- It has established a dedicated CoE to deliver transformational SAP S/4HANA initiatives

Limitations

- It needs to further invest in upskilling and cross-skilling its internally trained talent on SAP S/4HANA as the ratio of SAP S/4HANA certifications per FTE is relatively lower as compared with similar peers
- Some clients have cited instances where Infosys was not able to scale its onshore presence to deliver SAP S/4HANA services
- It has scope to further build innovative proof points supported by SAP partner awards to instill confidence in the market
- Clients believe that Infosys should enhance its talent management capabilities – specifically in bringing experienced consultants and effective resource planning across different engagement phases
- It needs to further enhance its consulting and change management capabilities to effectively position itself as an end-to-end partner for SAP S/4HANA

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Infosys | SAP S/4HANA services profile (page 2 of 5)

Overview

Vision for SAP S/4HANA services: Infosys envisions to help its clients transform themselves to become "Live Enterprise" of the future – creating a highly interconnected enterprise by co-creating solutions on SAP S/4HANA platform.

Partnership status with SAP: Global Strategic Service Partner

Number of projects completed in 2020: 401

Number of SAP S/4HANA experts: 13,038

Percentage of projects by deployment model

High (>30%)	Medium (15-30%)	Low (<15%)
On-premise	Public cloud	Private cloud

Proportion of SAP S/4HANA services revenue by buyer size (annual revenue)

High (>25%)	Medium (10-25%)	Low (<10%)
Less than US$1 billion	US$1-5 billion	US$5-10 billion
US$10-20 billion	Greater than US$20 billion	

Proportion of SAP S/4HANA services revenue by business function

High (>30%)	Medium (15-30%)	Low (<15%)
Consulting	Implementation	Maintenance and support

Proportion of SAP S/4HANA services revenue by modules/capabilities

High (>25%)	Medium (10-25%)	Low (<10%)
Finance	Human resources	Others[1]
SAP S/4HANA LOB products including industries	Supply chain; sourcing and procurement	

Proportion of SAP S/4HANA services revenue by geography

High (>25%)	Medium (10-25%)	Low (<10%)
North America	Europe (excluding UK)	South America
Middle East & Africa	United Kingdom	Asia Pacific

Proportion of SAP S/4HANA services revenue by industry

High (>15%)	Medium (10-15%)	Low (<10%)
Energy and utilities	Public sector	BFSI
Retail, distribution, and CPG	Electronics, hi-tech, and technology	Telecom, media, and entertainment
Healthcare and life sciences	Travel and transport	Manufacturing
Others		

1 Includes Asset Management, Manufacturing, Sales & Services, Analytics, compatibly packs, and Integration

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Infosys | SAP S/4HANA services profile (page 3 of 5)

Key solutions

Proprietary solutions (representative list)			
Solution name	**Industry in focus**	**Focused SAP S/4HANA module**	**Details**
Infosys Catalyst Solution	All industry segments	Industry-specific solution	Pre-configured industry solution
Infosys IDEA Activate Methodology	All industry segments	Project management	The solution provides S/4 transformation methodology leveraging program management capabilities
S/4Assist Tool	All industry segments	SAP S/4HANA assessments	The solution provides detailed impact assessment leveraging the impact on legacy environment
Code Migration and Optimization Tool	All industry segments	SAP S/4HANA conversions	The solution provides conversion of legacy custom code leveraging ABAP skills in SAP S/4HANA
Shell Copy Approach and ConfigVictor Tool	All industry segments	Hybrid implementations	The solution provides knowledge of hybrid approach leveraging lift-and-shift approach for implementations

Custom-built SAP-certified solutions on SAP portal compatible with SAP S/4HANA (representative list)			
Solution name	**Industry in focus**	**Focused SAP S/4HANA module**	**Details**
Intelligent Order Creation	Health Sciences	Sales and Distribution	The solution streamlines the sales order process by leveraging deep business process knowledge
Smart Warehouse Cycle Count	Retail	Inventory Management	The solution streamlines inventory management by leveraging deep business process knowledge
Smart Supply Chain Management (Farm-to-Fork)	Manufacturing	Supply Chain	The solution streamlines the supply chain process by leveraging deep business process knowledge
Clinical Trial Supply Chain Management (CTSM)	Health Sciences	Supply Chain	The solution streamlines the clinical trial process by leveraging deep business process knowledge

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Infosys | SAP S/4HANA services profile (page 4 of 5)

Investments and partnerships

Key investments (representative list)		
Investment theme	**Focused SAP S/4HANA module**	**Details**
Transformation Center of Excellence (CoE)	All SAP S/4HANA modules	Dedicated CoE focusing on delivering SAP S/4HANA transformation programs. The CoE provides expertise and best practices for successful delivery
SAP S/4HANA Enablement Program	All SAP S/4HANA modules	Focused internal training program on enabling SAP consultants on SAP S/4HANA. Enables skilled resources for delivering SAP S/4HANA transformation programs

Key partnerships (representative list)		
Partner ecosystem		
Microsoft	AWS	GCP
Broadcom	Celonis	Clarity
Envista Corporation	Snowflake	Vertex
Vendavo	NextLabs	UiPath
Tricentis	SNP	Vistex

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Infosys | SAP S/4HANA services profile (page 5 of 5)

Case studies

Case study 1	A US-based large chocolate manufacturer

Business challenge

The client wanted improvement in consolidated reporting along with business agility, better experience, and business resilience.

Solution

Infosys offered end-to-end services and implemented SAP S/4HANA on-premise solution underpinned by key IPs S/4Assist, Instant FIORI, and IDEA Activate.

Impact

- The solution improved consolidation and reporting for the client
- The solution provided data harmonization for the client

Case study 2	A leading global multinational supplier of branded and generic pharmaceutical products

Business challenge

The client was to transform its business processes to lower TCO and drive better stakeholder experience.

Solution

Infosys implemented SAP S/4HANA on-premise leveraging its key IPs – Catalyst, S/4QA, and IDEA Activate solutions for the client.

Impact

- This solution improved visibility into supply chain for the client
- The solution accelerated the inventory movements and enhanced the system for the client

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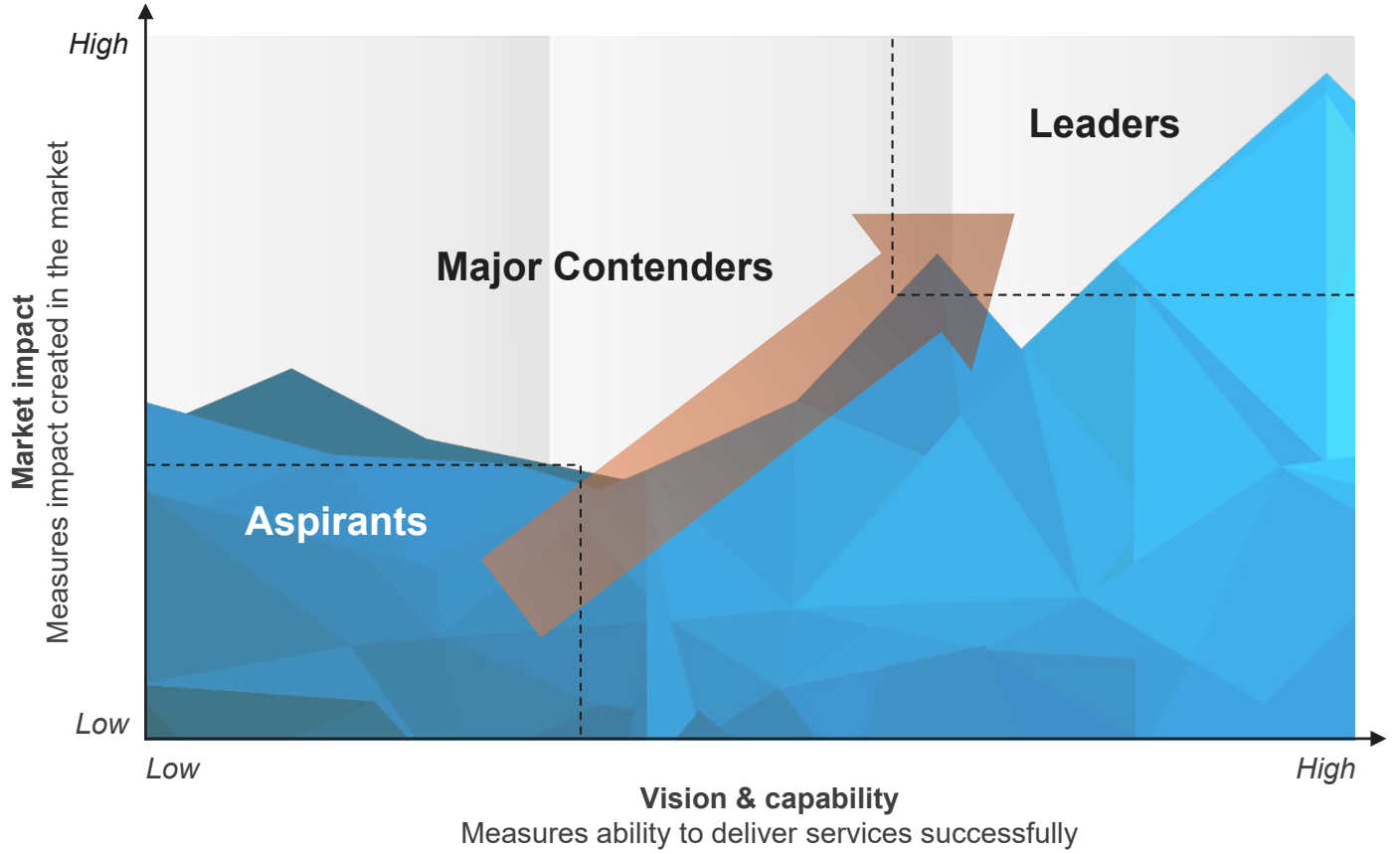
Appendix

Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision & capability

Everest Group PEAK Matrix



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Services PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

Market adoption

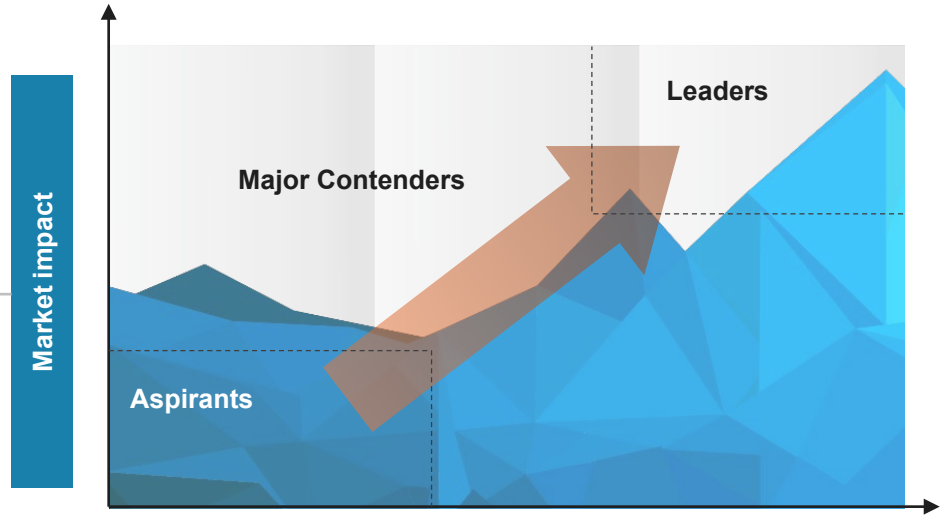
Number of clients, revenue base, YOY growth, and deal value/volume

Portfolio mix

Diversity of client/revenue base across geographies and type of engagements

Value delivered

Value delivered to the client based on customer feedback and transformational impact



Vision & capability

Measures ability to deliver services successfully. This is captured through four subdimensions

Vision and strategy

Vision for the client and itself; future roadmap and strategy

Scope of services offered

Depth and breadth of services portfolio across service subsegments/processes

Innovation and investments

Innovation and investment in the enabling areas, e.g., technology IP, industry/domain knowledge, innovative commercial constructs, alliances, M&A, etc.

Delivery footprint

Delivery footprint and global sourcing mix

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FAQs

Does the PEAK Matrix® assessment incorporate any subjective criteria?
Everest Group's PEAK Matrix assessment adopts an unbiased and fact-based approach (leveraging service provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information). In addition, these results are validated / fine-tuned based on our market experience, buyer interaction, and provider/vendor briefings

Is being a "Major Contender" or "Aspirant" on the PEAK Matrix, an unfavorable outcome?
No. The PEAK Matrix highlights and positions only the best-in-class service providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition

What other aspects of PEAK Matrix assessment are relevant to buyers and providers besides the "PEAK Matrix position"?
A PEAK Matrix position is only one aspect of Everest Group's overall assessment. In addition to assigning a "Leader", "Major Contender," or "Aspirant" title, Everest Group highlights the distinctive capabilities and unique attributes of all the PEAK Matrix providers assessed in its report. The detailed metric-level assessment and associated commentary is helpful for buyers in selecting particular providers/vendors for their specific requirements. It also helps providers/vendors showcase their strengths in specific areas

What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?
- Participation incentives for buyers include a summary of key findings from the PEAK Matrix assessment
- Participation incentives for providers/vendors include adequate representation and recognition of their capabilities/success in the market place, and a copy of their own "profile" that is published by Everest Group as part of the "compendium of PEAK Matrix providers" profiles

What is the process for a service provider / technology vendor to leverage their PEAK Matrix positioning and/or "Star Performer" status ?
- Providers/vendors can use their PEAK Matrix positioning or "Star Performer" rating in multiple ways including:
  - Issue a press release declaring their positioning. See citation policies
  - Customized PEAK Matrix profile for circulation (with clients, prospects, etc.)
  - Quotes from Everest Group analysts could be disseminated to the media
  - Leverage PEAK Matrix branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)
- The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with the designated POC at Everest Group.

Does the PEAK Matrix evaluation criteria change over a period of time?
PEAK Matrix assessments are designed to serve present and future needs of the enterprises. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality as well as serve the future expectations of enterprises

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